Regular Investment/Regular Draw-down Plan Form

OneAnswer Frontier Investment Portfolio
OneAnswer Investment Portfolio
ANZ OneAnswer Investment Portfolio

November 2026

Customer Services
Phone 133 665
Email client@onepathsuperinvest.com.au
Website onepathsuperinvest.com.au
ANZ OneAnswer Investment Portfolio anz.com

OnePath Funds Management Limited (OnePath Funds Management)
ABN 21 003 002 800 AFSL 238 342

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☐ OneAnswer Frontier Investment Portfolio
☐ OneAnswer Investment Portfolio //Select
☐ ANZ OneAnswer Investment Portfolio //Select
☐ OneAnswer Investment Portfolio (Entry or Nil Entry Fee)
☐ ANZ OneAnswer Investment Portfolio (Entry Fee or Deferred Entry Fee)

Instructions

- This form should be completed if you would like to establish a Regular Investment Plan or a Regular Draw-down Plan. If you would like to establish both plans you must complete two separate forms.

Please nominate the type of plan you are requesting. Please cross (x) one of the following:

☐ Regular Investment Plan **or** ☐ Regular Draw-down Plan

Note: You cannot use both the Regular Investment Plan and the Regular Draw-down Plan for the same investment fund.

Important information

- The Regular Investment Plan allows you to add to your investment on a monthly or quarterly basis. Payments are automatically deducted from your nominated financial institution account.
- The Regular Draw-down Plan is an easy way for you to receive regular payments from your investment. You can elect to receive a fixed amount paid to your nominated account each month or quarter.
- Please refer to the current Product Disclosure Statement (PDS), and OneAnswer Frontier Investment Portfolio Additional Information Guide (available free of charge at onepathsuperinvest.com.au or by contacting your financial adviser or Customer Services on 133 665) for the terms and conditions relating to the Regular Investment Plan or Regular Draw-down Plan (including the Direct Debit Request Service Agreement on page 7 of this form).
- Please complete this form in CAPITAL LETTERS using black or blue pen and forward to: OneAnswer, GPO Box 5306, Sydney NSW 2001 or email* to client@onepathsuperinvest.com.au

* Emails can only be accepted from the email address currently held on our records.

1. Investor details – please print

Investor number ☐☐☐☐☐☐☐☐☐☐☐

Investor 1/Trustee 1

Title Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Dr ☐ Other ☐

Surname

Given name(s) (including middle name)

Contact phone

Investor 2/Trustee 2

Title Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Dr ☐ Other ☐

Surname

Given name(s) (including middle name)

Contact phone

1. Investor details – continued

Company/Partnership/Incorporated Association/Corporate Trustee

Name

Contact person)

Contact phone

2. Nominated financial institution account for direct debit

Section 2 is for the Regular Investment Plan only

The following financial institution account will be debited for the Regular Investment Plan each month/quarter:

Name of financial institution

Branch

Account holder's name

BSB ☐☐☐-☐☐☐ Account number ☐☐☐☐☐☐☐☐☐

Direct Debit Request

I/We request and advise OnePath Funds Management Limited (user ID number: 217850) to debit my/our nominated account under the terms of the payment arrangement made between us.

I/We acknowledge that this direct debit arrangement is governed by the terms of the Direct Debit Request Service Agreement on page 7 and I/we agree to be bound by, authorise and acknowledge such terms.

I/We understand that where a Regular Investment Plan payment is dishonoured, a dishonour fee as described in the OneAnswer Frontier Investment Portfolio Additional Information Guide is charged and that a processing fee may also be charged by my/our financial institution each time a regular investment is made.

All bank account signatories must sign below.

Signature of account holder A (sign clearly within box) ✗ Date (dd/mm/yyyy) / /

Signature of account holder B (sign clearly within box) ✗ Date (dd/mm/yyyy) / /

Note: If the nominated account above is transferred, closed or the account details have changed, please complete a Change of Details Form and advise us 14 days before the Direct debit date.

3. Nominated financial institution account for direct credit

Section 3 is for the Regular Draw-down Plan only

Please provide details of the financial institution account you would like your regular payments to be paid into:

Name of financial institution

Branch

Account holder's name

BSB ☐☐☐-☐☐☐ Account number ☐☐☐☐☐☐☐☐☐

Note: Payments can only be made to a bank account held in the name of the investor(s).

4. Regular Investment Plan/Regular Draw-down Plan details

Please select **one** option below.

☐ I would like my regular investment or Regular Draw-down Plan to be made as per my nominated auto-rebalance profile (where applicable).

Regular amount $☐☐☐,☐☐☐

Frequency ☐ Monthly **or** ☐ Quarterly

Please continue to section 5.

☐ I would like to nominate the regular amount per investment fund in the section below.

Note:

- If you have the auto-rebalance plan nominated on your account and you invest in an investment fund that is not within your auto-rebalance profile, we will cancel the auto-rebalance plan.
- Transaction costs may apply when calculating 'buy' (issue) and 'sell' (redemption) unit prices.

Investment Option name	Investment Option Code	Regular amount	Frequency Monthly	Frequency Quarterly	Distribution payment method Reinvest	Distribution payment method Account
Investment funds						
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		$☐☐☐,☐☐☐	☐	☐	☐	☐

Investment Option Name	OneAnswer Frontier Investment Portfolio	OneAnswer Investment Portfolio EF, NEF and //Select	ANZ OneAnswer Investment Portfolio
Multi-manager investment funds			
Investor Profile 2 – Conservative			
MultiSeries 30	SD18	J013	350
OnePath Conservative**	SD51	n/a	243
Investor Profile 3 – Moderate			
MultiSeries 50	SD36	J016	349
OnePath Balanced**	SD05	BEN	242
Investor Profile 4 – Growth			
MultiSeries 70	SD19	J018	378
MultiSeries 90	SD20	J019	351
OnePath Active Growth**	SD02	MAN	337
OnePath Managed Growth**	SD52	n/a	241
Investor Profile 5 – High growth – Global shares			
OptiMix Global Emerging Markets Shares	SD65	J052	408
OptiMix Global Shares	SD16	J010	n/a
Single manager investment funds			
Investor Profile 1 – Defensive			
ANZ Cash Advantage	SD86	J065	420
Investor Profile 2 – Conservative			
Kapstream Absolute Return Income	SD64	J043	392
OnePath Conservative Index	SE09	J071	437
OnePath Diversified Bond Index	SD84	J063	418

Investment Option Name	OneAnswer Frontier Investment Portfolio	OneAnswer Investment Portfolio EF, NEF and //Select	ANZ OneAnswer Investment Portfolio
OnePath Diversified Fixed Interest	SD37	J003	328
Pendal Monthly Income Plus	SD66	J053	409
Perpetual Conservative Growth	SD44	J015	395
Schroder Fixed Income	SE06	J081	447
UBS Diversified Fixed Income	SD49	J004	n/a
Investor Profile 3 – Moderate			
Janus Henderson Diversified Credit	SD57	J040	386
OnePath Balanced Index	SE10	J072	438
Schroder Real Return	SD25	TCFD	385
T. Rowe Price Dynamic Global Bond	SE18	J086	452
Investor Profile 4 – Growth			
Bentham Global Income	SD58	J041	387
BlackRock Diversified ESG Growth	SD48	J022	384
BlackRock Tactical Growth	SD26	TMLB	n/a
OnePath Growth Index	SE11	J073	439
OnePath Multi Asset Income**	SD01	TTEI	336
Perpetual Balanced Growth	SD45	J021	394
Investor Profile 5 – High growth – Multi-sector			
OnePath High Growth Index	SE12	J074	440
Investor Profile 5 – High growth – Australian shares			
Ausbil Australian Emerging Leaders	SD55	J038	382
BlackRock Advantage Australian Equity	SD59	J035	357
Fidelity Australian Equities	SD80	J059	415
First Sentier Imputation	SD24	TCFI	364
Greencape Broadcap	SE03	J085	451
Merlon Australian Share Income	SD68	J054	410
OnePath Australian Shares	SD06	AST	323
OnePath Australian Shares Index	SD77	J044	369
OnePath Australian Shares Income******	SD03	BLUE	322
OnePath Emerging Companies	SD04	GREE	n/a
OnePath Geared Australian Shares Index	SD71	J047	403
OnePath Select Leaders	SD38	J025	327
OnePath Sustainable Investments – Australian Shares	n/a	J012	n/a
Pendal Australian Shares	SD79	J058	414
Pendal Smaller Companies	SD60	J034	379
Perpetual Australian Shares	SD27	TAPT	363
Perpetual ESG Australian Share	SD75	J057	413
Schroder Australian Equity	SD40	J008	362
Investor Profile 5 – High growth – Global shares			
Antipodes Global Value Fund***	SD11	TJAP	402
Arrowstreet Global Equity (Hedged)	SD32	TLIT	366
BlackRock Advantage International Equity	SD42	J011	368
OnePath Global Emerging Markets Shares	SD10	n/a	346
OnePath Global Shares	SD08	TIST	390
OnePath Global Smaller Companies Shares	SD34	J028	n/a
OnePath International Shares Index	SD23	TTNG	400

Investment Option Name	OneAnswer Frontier Investment Portfolio	OneAnswer Investment Portfolio EF, NEF and //Select	ANZ OneAnswer Investment Portfolio
OnePath International Shares Index (Hedged)	SD78	J045	370
T. Rowe Price Global Equity	SD83	J062	417
Vinva Global Alpha*****	SD28	TFPI	358
Investor Profile 5 – High growth – Property			
OnePath Australian Property Securities Index	SD67	J046	401
OnePath Global Property Securities Index	SD73	J050	406
OnePath Property Securities	SD07	n/a	340
Investor Profile 5 – High growth – Infrastructure			
ClearBridge Global Infrastructure Value Hedged****	SD82	J061	n/a
First Sentier Global Listed Infrastructure	SE04	J084	450
OnePath Global Listed Infrastructure Index	SE51	n/a	n/a

N/A – This fund is not available for this product.
** This fund is closed to new investors.
*** Previously known as Antipodes Global (Long only).
**** Previously known as ClearBridge RARE Infrastructure Value Hedged.
***** Previously known as Magellan Global
****** Previously known as OnePath Blue Chip Imputation

5. Declaration and signature(s)

By signing this form, I/we:

- For OneAnswer Frontier Investment Portfolio and OneAnswer Investment Portfolio, confirm that I/we have read and agree to the terms in the current PDS which is available free of charge on onepathsuperinvest.com.au or by contacting Customer Services on 133 665
- For ANZ OneAnswer Investment Portfolio, confirm that I/we have read and agree to the terms and conditions of the current PDS, which is available free of charge at anz.com or by contacting Customer Services on 133 665
- acknowledge that there is additional information which forms part of the PDS in the form of the Additional Information Guide which includes additional information which may assist me/us in making my/our investment decision
- understand the personal information (including sensitive information, where required and authorised) is provided for the purpose stated on the front of this form. Any personal information provided in this form will be handled in accordance with OnePath Funds Management's privacy policy located at onepathsuperinvest.com.au/about-us/privacy-policy. If personal information of another individual has been provided, I/we have their consent to provide this and have made the other party aware of this privacy statement
- acknowledge that OnePath Funds Management is a wholly owned subsidiary of Insignia Financial Limited (ABN 49 100 103 722) (Insignia Financial). ANZ Banking Group Limited (ABN 11 005 357 522) (ANZ) is an alliance partner of Insignia Financial. The ANZ brand is a trademark of ANZ and is used under licence by Insignia Financial. ANZ and the Insignia Financial group of companies (including OnePath Funds Management) are not related bodies corporate. Except as set out in the relevant PDS, this product is not a deposit or other liability of ANZ or its related group companies. None of them stand behind or guarantee the issuer
- acknowledge that ANZ, OnePath Funds Management or its related companies do not guarantee the repayment of capital, the performance of, or any rate of return of an investment in the products listed in Page 1 of this form. I/We further acknowledge that my/our investment is subject to investment risk, including possible repayment delays and loss of income and principal invested
- acknowledge that I am/we are not aware and have no reason to suspect that my/our investment is derived from, related to or used to fund money laundering, terrorism financing and other similar activities and my/our instructions related to my/our investment will not result in OnePath Funds Management or its related group companies breaching any related laws or regulations in Australia or any other country
- acknowledge that ANZ, OnePath Funds Management or their related group companies may be required to pass on my/our personal information or information about my/our investment to the relevant regulatory authority in compliance with the applicable laws and regulations such as the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006* (Cth) and OnePath Funds Management or its related group companies can delay or decline to process a transaction and report it to the relevant regulatory authority if ANZ, OnePath Funds Management or their related group companies is required to do so under the law
- authorise OnePath Funds Management and its related companies to use my/our personal information to send me/us information about their products or services from time to time. I/we also authorise OnePath Funds Management to disclose my/our personal information to organisations in an arrangement or alliance with OnePath Funds Management or its related companies, to share information for marketing purposes and to enable those alliance partners to send me/us information about their products and services. I/we understand that I/we may phone 133 665 to advise that I/we do not want my/our personal information used or disclosed by OnePath Funds Management, its related companies or alliance partners for marketing purposes
- authorise my/our financial adviser to receive and access my/our personal information for the purposes of managing my/our investment and to use the online service. Where there is any change relating to my/our financial adviser, I/we will notify OnePath Funds Management of the change in writing
- declare that the information completed on this form is true and correct.

Name of Investor 1/Director/Trustee

Signature of Investor 1/ Director/Trustee
(sign clearly within box)
✗

Date (dd/mm/yyyy) / /

Name of Investor 2/ Director/Company Secretary/Trustee

Signature of Investor 2/ Director/Company Secretary/Trustee
(sign clearly within box)
✗

Date (dd/mm/yyyy) / /

If signed under power of attorney, the attorney certifies that he or she has not received notice of revocation of the power of attorney. Please include a certified copy of the power of attorney with this form.

In the case of company signatories, two directors or a director and a company secretary must sign, unless you are a sole director and sole company secretary.

For partnerships, please ensure all partners sign.

Company Seal

Direct Debit Request Service Agreement

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ANZ OneAnswer Investment Portfolio anz.com

Please keep this document in a safe place.

Our commitment to you

Drawing arrangements:

- Where the due date falls on a non-business day, we will draw the amount on the next business day.
- We will not change any details of drawings arrangements without giving you at least fourteen (14) days written notice.
- We reserve the right to cancel the OnePath Funds Management Limited drawing arrangements if three or more drawings are returned unpaid by your nominated Financial Institution and to arrange with you an alternate payment method.
- We will keep all information pertaining to your nominated account at the Financial Institution, private and confidential unless otherwise required by the Bulk Electronic Clearing System (BECS) rules. You acknowledge that we may be required to disclose details of your direct debit request to our sponsor bank to assist with the checking of any incorrect or wrongful debits to your nominated account.
- We will only arrange for funds to be debited from your account as authorised in the Direct Debit Request.

Your rights

- You may terminate the OnePath Funds Management Limited drawing arrangements at any time by giving written notice directly to us, or through your nominated Financial Institution. Notice given to us should be received by us at least 14 days prior to the due date.
- You may stop payment of a drawing under the OnePath Funds Management Limited arrangement by giving written notice directly to us, or through your nominated Financial Institution. Notice given to us should be received by us at least 14 days prior to the due date.
- You may request change to the drawing amount and/or frequency of OnePath Funds Management Limited drawings by contacting us and advising your requirements no less than 14 days prior to the due date.
- Where you consider that a drawing has been initiated incorrectly (outside the OnePath Funds Management Limited arrangements), you should notify us directly as soon as possible so that we can resolve your query. Alternatively you can take it up directly with your financial institution.
  - If we reasonably conclude as a result of our investigations that your account has been incorrectly debited we will respond to your query by arranging for your financial institution to adjust your account (including interest and charges) accordingly. We will also notify you in writing of the amount by which your account has been adjusted.
  - If we reasonably conclude as a result of our investigations that your account has not been incorrectly debited we will respond to your query by providing you with reasons and any evidence for this finding in writing.

Your commitment to us

Your responsibilities:

- You should check:
  - with your financial institution whether direct debiting is available from your account as direct debiting is not available on all accounts offered by financial institutions
  - your account details which you have provided to us are correct by checking them against a recent account statement
  - with your financial institution before completing the Direct Debit Request if you have any queries about how to complete the Direct Debit Request.
- It is your responsibility to ensure that sufficient funds are available in the nominated account to allow a debit payment to be made in accordance with the Direct Debit Request. If there are insufficient funds in your account to meet a debit payment:
  a) You may be charged a fee and/or interest by your financial institution
  b) You may also incur fees or charges imposed or incurred by us; and
  c) You may arrange for the debit payment to be made by another method or arrange for sufficient clear funds to be in your account by an agreed time so that we can process the debit payment.
- It is your responsibility to ensure that the authorisation given to draw on the nominated account is identical to the account signing instruction held by the Financial Institution where the account is based
- It is your responsibility to advise us if the account nominated by you to receive the OnePath Funds Management Limited drawings is transferred or closed
- It is your responsibility to arrange with us a suitable alternate payment method if you wish to cancel the OnePath Funds Management Limited drawing

BCE-4441 (4543) 1126